

Message Text

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SUBJECT: SUPPLY OF URANIUM CONCENTRATE TO UK

REF: PRETORIA 1231 (NOTAL)

1. FOR YOUR BACKGROUND INFORMATION IN CONNECTION WITH
FUTURE DISCUSSIONS ON NAMIBIA, INR HAS PREPARED THE
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FOLLOWING ASSESSMENT OF THE UK'S DEPENDENCE ON URANIUM
FROM NAMIBIA. IT INDICATES THAT, AT LEAST FOR THE NEAR
TERM, THE UK WILL NOT BE IN A POSITION TO FOREGO
NAMIBIAN URNAIUM SUPPLY.

2. CANADA, SOUTH AFRICA, AND NAMIBIA ACCOUNT FOR ALL
(RESPECTIVELY 61, 21, AND 18 PERCENT) OF PAST AND PRESENT

URANIUM SALES TO THE UK. FOR THE 1977-1983 PERIOD, ACCORDING TO ERDA'S INFORMATION (PROTECT AS PROPRIETARY), CANADA AND NAMIBIA WILL BE THE SOLE FOREIGN SUPPLIERS (1100 AND 1250 METRIC TONS PER YEAR, RESPECTIVELY). THIS WILL ACCOUNT FOR ABOUT HALF OF THE UK'S TOTAL URANIUM REQUIREMENTS, THE BALANCE OF WHICH WILL BE MET BY RECOVERY OF UNBURNED URANIUM BY SPENT FUEL REPROCESSING. WE HAVE NO INFORMATION THAT SOUTH AFRICA WILL SUPPLY NATURAL

URANIUM TO THE UK AFTER THIS YEAR, AND EXPECT THAT SOUTH AFRICA WILL RESERVE ITS OWN URANIUM AS FEED IN ITS PILOT AND PLANNED COMMERCIAL ENRICHMENT PLANTS.

3. IN 1984-91, CANADA WILL SUPPLY 1000 METRIC TONS/YEAR, WHICH WILL AMOUNT TO ABOUT ONE-TENTH OF UK REQUIREMENTS. IN THE ABSENCE OF SPECIFIC INFORMATION, WE BELIEVE THAT THE BALANCE WILL COME FROM NAMIBIA AND FROM REPROCESSING OF FUEL IN THE UK.

4. NAMIBIAN URANIUM COMES FROM THE ROSSING MINING COMPLEX ABOUT 60 MILES FROM WALVIS BAY, OPERATED BY RIO TINTO (45 PERCENT BRITISH-OWNED). IF THIS SOURCE WERE LOST, ONLY CANADA OR THE US COULD MAKE UP THE RESULTING DEFICIT IN THE NEAR TERM (I.E., WITH A LEAD TIME OF 1-3 YEARS). CANADIANS ARE CURRENTLY NOT SUPPLYING URANIUM TO EC COUNTRIES PENDING OUTCOME OF NEGOTIATIONS ON APPLICATION OF CANADIAN NUCLEAR EXPORT GUIDELINES.

5. AUSTRALIA AND WEST COAST AFRICA ARE LESS CERTAIN
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POTENTIAL SUPPLIERS IN THE LONGER TERM. AUSTRALIA'S LARGE RESERVES ARE UNDEVELOPED, AND 4-5 YEARS WOULD BE REQUIRED TO DEVELOP CAPACITY TO MEET BRITISH REQUIREMENTS. CURRENT PRODUCTION IS FULLY COMMITTED, AND NO NEW EXPORT COMMITMENTS ARE CONTEMPLATED PENDING OUTCOME OF MAJOR NUCLEAR POLICY REVIEW. URANIUM RESERVES IN NIGER AND GABON ARE UNDER DEVELOPMENT BY FRENCH, US, ITALIAN, SPANISH, AND JAPANESE INTERESTS. CURRENT PRODUCTION IS COMMITTED; OWNERSHIP OF UNDERDEVELOPED RESERVES IS UNCERTAIN BUT IN ANY EVENT THEY WOULD NOT BE AVAILABLE FOR EXPORT IN LESS THAN 3-4 YEARS.

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